



mejorando group

RFP #1235

October 28, 2013

San Luis Obispo County

Employee University Training & Development Consultant

Submitted By:

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October 25, 2013

County of San Luis Obispo County
Phill Haley, GSA Purchasing
1087 Santa Rosa Street
San Luis Obispo, CA 93408
Purchasing Division of Finance

Dear Mr. Haley:

The Mejorando Group is pleased to offer our expertise to San Luis Obispo County as a partner engaged to assist your efforts aimed at accelerating employee performance and organizational effectiveness by adopting a Learning and Development Strategic Plan. The Mejorando Group has performed a number of similar engagements for local government organizations.

Our qualifications are highly relevant in terms of performing your specific tasks and providing quality deliverables that will be extremely useful. A few highlights for you to consider are that the Mejorando Group:

- **Experience with San Luis Obispo County on Learning and Development.** In June, 2013 our firm was retained to complete a **preliminary Blueprint** which outlined specific actions County leaders should pursue to pursue the adoption and implementation of a County-wide Learning and Development Program. The scope of work involved meeting with the County Manager, other senior leaders and facilitating a meeting of the Employee University Advisory Committee (EUAC) to obtain input on ideas to accelerate and fortify current learning and development activities. Several of our recommendations were incorporate into the RFP which this proposal is responding to. As a result of our work, we created rapport with County leaders and members of the EUAC which is essential to an effective working partnership.

In addition to the preliminary blueprint, we were also retained to complete a **Workforce Analysis** designed to identify critical positions. This report is scheduled to be provided to County HR staff on October 31. Various workforce data sources are evaluated for purposes of this report including turnover and workforce

demographics culminating in a list of County job titles which are considered critical and the basis for immediate learning and development efforts.

Consequently, I am extremely familiar with the County's working climate/culture, pressing issues and role of learning and development as a mechanism to ensure high quality service delivery.

- **Works extensively and exclusively with local government organizations.** Mejorando Group consultants partner with local government organizations on a regular basis. We count a number of public sector organizations in California as clients, including the counties of Humboldt, San Mateo, Santa Barbara and cities of Beverly Hills, Carlsbad, Irvine, Long Beach, Newark, San Bruno, San Jose, San Luis Obispo, and Thousand Oaks.
- **Has in-depth experience and expertise in designing and implementing leading-edge Learning and Development Programs.** Our team has a clear understanding of the complexity of learning and development in a local government environment. Specifically, we have in-depth experience in the day-to-day operational needs and required competencies for mission-critical positions. As a result, we can effectively help you develop proactive steps required to ensure that key knowledge and information is retained. We serve as both the architect (designer) and contractor (implementer) of systematic and comprehensive Learning and Development Programs for the cities of Bismarck (ND), Chandler (AZ), Colleyville (TX), Gilbert (AZ), Greensboro (NC), Irvine (CA), San Bruno (CA), San Jose (CA), Wellington (FL), and Wilmington (NC).

Offering consultation, facilitation, and training, since 2002 our firm has provided organizational effectiveness services to client-partners that help achieve desired results. We take our name from the Spanish word, Mejorando, which means "*Getting Better All the Time.*" This reflects our commitment to our approach with clients who are seeking new ways to improve constantly.

We welcome the opportunity to work with the employees of San Luis Obispo County. Please contact me at patrick@gettingbetterallthetime.com or 925-518-0187 for questions about this proposal.

Sincerely,

Patrick Ibarra
Co-Founder and Partner

A. FIRM QUALIFICATIONS

"Patrick really understands current workforce planning issues and what it takes to resolve them. The Mejorando Group impressed us in the competitive selection process, and they came through in a timely manner with a systematic and comprehensive workforce planning program, and Patrick is continuing to consult with us as we put recommendations into place."

*Keith Hunke
Assistant City Administrator
City of Bismarck, North Dakota*

Founded in 2002, the Mejorando Group is a consulting practice focused on improving the management and operation of government organizations. Offering consultation, facilitation, and training the Mejorando Group values building and sustaining customer relationships by helping align your most important resource – your people – so that your organization moves faster and more effectively toward accomplishing your goal of high-quality public service. We take our name from the Spanish word, Mejorando, which translated means "Getting Better All The Time." This reflects our commitment to our approach with clients who are seeking new ways to improve constantly.

We feature a proven record of partnering with organizations through the myriad of issues influencing individual performance, group/team interactions, and overall organizational effectiveness. Our "hands-on" approach and ability to collaborate with all levels, from field personnel to executive management, enable us to integrate strategy, structure, process, quality, and culture to the desired end: optimal performance.

The Mejorando Group is a sole proprietor based business, blended with a select group of professionals that have served as executives and managers in organizations from both the public and private sector, and together have several years of experience working in all aspects of local government management. This arrangement generates multiple dividends, including the application of extensive subject-matter experts and seasoned organizational development practitioners combined with the vast experience and expertise of former local government executives. Together, we help to effectively disrupt the status quo and bring leading-edge solutions to improve employee performance and organizational effectiveness.

Our full range of services includes the following:

- Learning and Development Programs and Services:
 - Succession Planning Programs – We are one of the country's leading experts in effectively addressing the impacts from the changing workforce and designing succession planning programs. Our approach is systematic and comprehensive and was the recipient of the Most Innovative Award presented by the Texas Municipal League. Mr. Ibarra is frequent speaker on this topic at national conferences and has published several articles, as well. We design and implement all aspects of a robust Succession Planning Program which focuses on establishing job-level Competencies and recommending targeted improvements to Recruitment, Selection, Leadership Development, Workforce Training, and Promotional processes – in which all are synchronized towards equipping an agency's workforce with the skills and capabilities to maintain high-quality service delivery and effective local government.
 - Training – Design and Delivery - We develop training strategies, design workshops, deliver and evaluate training, and provide coaching to executives and managers. Our “instructor-led, participant centered” approach to training limits lecture and focuses on using a variety of instructional methods (e.g. discussions, video-clips, case studies, small group exercises, handouts to complete, skill-practices, and group discussions) to maximize the use of Adult Learning. Our goal is for participants to master the knowledge, skills and behaviors emphasized in the training program and apply them to their day-to-day activities. We feature over forty (40) competency-based training workshops for workforce members from all areas of your organization, front-line to executives.
 - Leadership and Management Academy(ies) – We design and implement Leadership and Management Academies including assisting with candidate selection processes, curriculum development, training delivery including an on-line/web-based component, and facilitation of action learning teams.
 - Coaching – We provide coaching services to middle and senior level managers and seasoned executives designed to improve individual performance and organizational effectiveness. We are certified in Performance Assessment (i.e. 360-degree feedback processes) from the Center for Creative Leadership.
 - Mentoring Programs – We design and implement award-winning Mentoring Programs that reflect an organization's culture and match

leaders as mentors with those employees interested in accelerating their performance and career trajectory.

- Knowledge Transfer – We provide leading edge practices enabling organizations to effectively transfer high value tacit knowledge essential for business continuity. Knowledge Transfer is a rapidly growing occurrence within forward-thinking organizations concerned about mitigating the impacts of the departure of seasoned employees.
- Organizational Analysis and Process Improvement – We review and analyze various functional areas within an organization or agency to help discover more effective ways to manage and perform management and organizational activities. The Mejorando Group helps organizations succeed in their efforts to excel by utilizing a results-oriented approach that assesses the current effectiveness of human capital, business strategies, structures, programs, work processes, and measurement systems. Strategies and tactics are provided to disrupt the status quo, and breakthrough practical solutions are implemented to align the organization's people and work processes toward high performance
- Facilitation – Our approach to facilitation, from team building to strategic planning, enables a group to focus on future business conditions and generate progressive strategies and innovative tactics to effectively anticipate and respond to those often changing circumstances. This results in a proactive and dynamic approach to sustaining a high-quality, high-performance organization. We are certified in Facilitation Skills from Development Dimensions International (DDI).

Beyond our [website](#) which provides general information on our firm, services we provide, list of clients, and resources such as articles we have authored, we are extremely active in social media, providing relevant and timely content to those persons who are vigilant about “getting better all the time.” Please visit our sites on [Facebook](#) and [Twitter](#) for the latest solutions to the most pressing challenges confronting government leaders. Finally, each quarter we author an e-newsletter, “[Moving Forward](#)” distributed to over 3,500 public sector professionals providing a path forward through the turbulent times impacting government.

SPECIFIC DESIGN AND PROJECT EXPERTISE RELATIVE TO SAN LUIS OBISPO COUNTY

Our team has extensive experience and in-depth expertise that is highly compatible with the requirements of the Project Scope for San Luis Obispo County. We have partnered with leaders from a number of local government organizations serving as the architect (designer) and implementer (contractor) of systematic and comprehensive Learning/Training and Development Programs including:

- Collaborating with organizational leaders and senior Human Resource and Organizational Development staff in crafting program objectives and components.
- Creating and implementing comprehensive and systematic Succession Planning Programs and Leadership Development Programs.
- Designing program components including candidate selection process for Leadership and Management Development Programs.
- Designing and delivering a large number of competency based workshops for all levels of the workforce – front line, supervisory, senior management and executives.
- Facilitating the process to adopt competencies for front-line employees, mid-managers and executives.
- Administering 360-degree feedback assessment instruments of select employees.
- Facilitating one-on-one consultations with 360-degree participants to create a customized self-development training and development plan.
- Aggregating 360-degree feedback from all program participants into overall performance assessment and providing series of recommendations focusing on training, development, performance management, organizational culture, and management practices.
- Facilitating online threaded discussion/chat forum for participants to engage in learning outside training classroom activities.
- Delivering executive education programs.
- Creating and administering range of evaluation tools including Levels 1 through 4 for training and group meetings/debrief.
- Designing and implementing Knowledge Transfer Programs.
- Providing performance coaching to a range of management and executive level employees.

The Mejorando Group has provided highly successful learning and development programs for local government organizations nationwide. Our team will bring San Luis Obispo County “next practices” emblematic of progressive organizations that have made serious strides in equipping their workforce with the competencies and capabilities necessary to succeed in the 21st century.

PROJECT TEAM

PATRICK IBARRA

Co-Founder and Partner, The Mejorando Group

As co-founder and partner in The Mejorando Group, Patrick Ibarra is responsible for Human Resource Development, Coaching, Facilitation and Organizational Effectiveness services. As a Consultant and Manager in both public and private sector organizations, ***including as a city manager and human resource director***, Mr. Ibarra brings organizations over 28 years of experience and a shared understanding of the particular demands and constraints placed on organizations and their employees. He possesses a strong foundation in the principles, practices and applications of organizational development, facilitation, and training along with a solid background in coaching and executive assessment. As one of the country's leading experts on succession planning for government agencies, Mr. Ibarra brings leading edge solutions to optimize talent development.

A Speaker, Author and Conference Presenter, Mr. Ibarra also serves on the adjunct faculty staff at Arizona State University. He teaches courses on organizational change.

Employment History

- The Mejorando Group Consulting Practice, Co-Founder and Partner
- City of Port Angeles, Washington City Manager
- City of Mason, Ohio Assistant City Manager and Human Resource Director
- City of Emporia, Kansas, Management Assistant, Office of the City Manager
- City of Phoenix, Arizona, Management Assistant, Public Works Department

Education

- Master of Human Resources and Organization Development, University of San Francisco
- Master of Public Administration, Arizona State University
- Bachelor of Science degree, Political Science, Central Missouri State University
- Certificate in Training and Human Resource Development, University of California-Berkeley
- Certified to administer Assessment and Performance Support tools (i.e. 360-degree), Center for Creative Leadership
- Certified Facilitator, Development Dimensions International

Professional Experience

- Designed and delivered a series of leadership, management and supervisory training workshops for a number of cities, counties, and special government districts.
- Principal consultant engaged to design and administer comprehensive and systematic Succession Planning Program for cities of Bismarck (ND), Colleyville (TX), Greensboro (NC), and Irvine (CA).
- Principal consultant to design and implement a Workforce Planning Program for the City of San Jose (CA).
- Provide executive coaching services to a number of mid-managers and department directors serving in local government.
- Designed and administered 360-degree Assessment/Feedback Program for executives in the City of Eloy, Arizona and Union Sanitary District (CA).
- Partnered with City of Chandler (AZ) and Town of Gilbert (AZ) to create competency models and improve recruitment, selection and promotion processes.
- Principal consultant responsible for designing and implementing Knowledge Management Transfer Program for City of Fort Collins, Colorado Utilities Department and Costa Mesa (CA) Sanitary District.

Kristin Esty Ibarra

Co-Founder and Partner, The Mejorando Group

As co-founder and partner in The Mejorando Group, Ms. Esty-Ibarra is responsible for Training and Development projects, Performance Management and Competency development. As a practitioner in both public and private sector organizations, in roles ranging from individual contributor to Executive Leadership, Ms. Esty-Ibarra brings over 25 years of experience from a variety of settings. Ms. Esty-Ibarra has served most recently as Talent Management Leader in a large public utility, Program Administrator of Leadership and Organizational Development in a large state agency, a manager in Government organizations, as well as Manufacturing, Consulting, and Service industries.

Ms. Esty-Ibarra is an expert in facilitating organizations through complex problem-solving to action and improvement. Areas of expertise include:

- Organizational Effectiveness/Organizational Development
- Employee Development and Learning
- Competency-Based Human Capital Processes (i.e., Recruiting/Selection, Performance Management, Training & Development, Rewards/Recognition, Succession Planning)
- Learning Management Systems (LMS)

Professional Experience

Talent Management

- Developed and implemented High Potential Strategy in support of APS (Arizona Public Service – electric utility provider) Leadership Sustainability
- Success Factors Business Owner – Responsible for all Succession functionality and Subject Matter Expert in Performance Management function.
- Developed Diversity Strategy
- Developed Talent Management Scorecard in support of Corporate Resource Operations Management process

Integrated Talent Management

- Developed and implemented competency-based Integrated Talent Management Strategy (Coventry sole Talent Management expert)
- Saba Talent Administrator – Responsible for all Integrated Talent Management functionality within the Saba system.
- Aligned all training and development opportunities with competency-based Integrated Talent Management.
- Served as Executive and leadership Talent Management/Succession Planning coach/consultant

Special Projects

- Served as member of Recruitment and On-boarding Steering Committee, Liaison between Steering Committee and Workgroup. Chair of Workgroup.
- Provided On-boarding best practices and business requirements for ATS and On-boarding system RFP
- Revitalized and assumed ownership of Executive and Leadership On-boarding programs
- Re-designed, created, automated, implemented and maintained New Employee Orientation for Customer Service Organization
- Created Strategy, and Blueprint (beginning implementation of) Coventry Healthcare, Inc.'s Diversity / Inclusion initiative.
- Administered MBTI instrument in support of Enterprise-wide team development

Employment History

- The Mejorando Group, Consulting Practice, Co-Founder and Partner
- Arizona Public Service, Talent Management Leader
- Coventry Healthcare, Arizona, Employee Development Senior Organizational Development Consultant
- State of Arizona, Department of Economic Security, Program Administrator – Organization and Management Development
- Dublin San Ramon Services District, Employee Development Specialist
- The Clorox Company, People Development Manager

Education, Certifications & Awards

- M.A. Applied Social Psychology, Miami University, Oxford, OH.
- B.A. Liberal Arts, Psychology Major, Knox College, Galesburg, IL.
- Qualified Myers Briggs Type Instrument (MBTI) Administrator
- Certified Skills for an Empowered Workforce Instructor and Certified Targeted Selection Administrator, Development Dimensions International
- NCCIPMA Award for Excellence in Innovation – Small Agency; CASA Award for Excellence in Innovation – Small Agency (Mentoring Program)

AMY OCEAN

Management Associate

Ms. Ocean has extensive experience in all aspects of Learning and Development including design, development and implementation of innovative and business driven solutions. Her areas of expertise include:

- Needs analysis/Instructional design
- Human performance/Leadership
- Expert facilitator/Consulting
- ADDIE/Kirkpatrick
- Captivate, Success Factors, Plateau, Saba

Professional Experience

- Design, develop, and deliver business focused leadership development programs in support of organizational values and strategic objectives. Collaborate with HR Business Partners and Organization Effectiveness Specialists to ensure corporate programs are well aligned with business unit goals and strategies.
- Developed and implemented online career guides for Finance job families using the Lominger competency model - led project to successful completion on time and under budget
- Successfully launched enterprise wide leadership immersion program for newly promoted leaders
- Created and delivered an interactive learning activity to reinforce leadership development concepts
- Designed Hi-Potential development opportunities in support of Talent Management initiatives for Hi-Po Managers, Hi-Po Directors, Hi-Po VP's, and C-Suite leaders
- Expert distance learning professional using Webex and MS Office Live Meeting tools.
- Partnered with Human Resources on Talent Management initiatives (succession and talent planning)
- Supported a competency model implementation and mapped competencies to learning programs
- Consulted on training development and delivery of new enterprise wide expense system
- Coordinated training needs assessment and prioritized training delivery.

Employment History

- Arizona Public Service - Leadership Development Specialist
- Aetna (Coventry Health Care, Inc.) - Senior Consultant Learning & Performance
- Nationwide Insurance - Learning & Performance Consultant

Education

- Franklin University (Business Management major), Columbus, OH
- Human Capital Strategist certification
- Achieve Global Certified Facilitator
- ELI Certified Instructor - Civil Treatment in Workplace
- BTS Certified Instructor - Symphony, Applause, and Conductor programs
- DDI Certified Facilitator - Interaction Management Series - Leadership Mirror 360
- Certified Instructor- Fierce Conversations

REPRESENTATIVE EXPERIENCE AND REFERENCES

“One of the key components of our change management was a ‘Leaders Transforming Organizations’ training workshop, custom designed for us and presented by Patrick Ibarra. During the training sessions, Patrick provided our top leaders and managers with his ‘recipe’ for change management. Feedback from the evaluations was an appreciation for his relevant experience and knowledge of local government, his high energy, and his sequential approach to transformation. Participants are using Patrick’s techniques to articulate myriad changes that are currently underway to their groups. Patrick is the perfect person to infuse ideas, energy, and practical and applicable solutions into any organization that wants to innovate and stay ahead of local government trends.”

*Eileen Gomez
City of Boulder, Colorado*

City of San Bruno, California

Developed and implemented a Leadership Development Program that included establishing the candidate /participant selection process, the design and delivery of competency based training workshops and facilitation of action learning project teams. List of competency-based training workshops included: Art of Delegation, Creative Problem Solving, Facilitating Change, How to Inject Innovation into Local Government, Motivating Employees, Performance Management, Project Management, Taking Initiative: How to be more of a Leader, and Transitioning to Supervision. An on-line component was also included in this Leadership Development Academy that involved participants accessing content via the Mejorando Group’s website and engaging in several threaded discussions about workshop related topics. Contact person: Tami Yuki, Human Resources Director, (650) 616-7055, TYuki@sanbruno.ca.gov

City of Bismarck, North Dakota

Designed and implemented the City’s inaugural succession planning program that included a Learning and Development Program. The Leadership Development component encompassed facilitating work groups to adopt job-related competencies, creating program participant selection process, administering 360-degree process, facilitating one-on-one debriefs with participants to craft customized individual development and training plan and selecting training workshops. Contact person: Keith Hunke, Assistant City Administrator, 701-355-1303, khunke@nd.gov

City of Fort Collins, Colorado

Patrick Ibarra of the Mejorando Group was retained to design and implement a Knowledge Management Transfer Program for members of senior management within the Public Utilities Department. This included conducting Expert Interviews, creating Position Profiles, and providing a series of specific transfer tools and techniques. Contact person: Janet Miller, Director of Human Resources, JaMiller@fcgov.com 970-221-6826.

Town of Gilbert, Arizona

The Town of Gilbert obtained consulting services from the Mejorando Group to assist with implementation of a Talent Management approach to building workforce capacity. Services included evaluating workforce demographics to identify future staffing needs, creating performance leadership competencies through the facilitation of employee work groups, and providing a series of cohesive recommendations that make immediate improvements to recruitment, selection and promotional practices. Contact Person: Carrie Bosley, Human Resource Director, 480-503-6922, Carrie.Bosley@gilbertaz.gov.

City of Chandler, Arizona

The City of Chandler retained the Mejorando Group to provide succession planning consulting services as an approach to building workforce capacity. Services include evaluating workforce demographics to identify future staffing needs, creating performance leadership competencies through the facilitation of employee work groups, and designing and facilitating the creation of a Pilot Leadership Development Program that will include a 360-degree feedback assessment component along with curriculum development. Contact person: Debra Stapleton, Human Resource Director, Debra.Stapleton@chandleraz.gov 480-782-2350.

City of Colleyville, Texas

The City of Colleyville retained Patrick Ibarra of the Mejorando Group to design a comprehensive and systematic succession planning program. This program was the recipient of the Texas Municipal League Municipal Excellence Award. It identified at risk positions within the city workforce, featured recommendations to improve recruitment, selection, training, development, and performance management practices, and created a succession planning process to include selection of candidates, administration of 360-degree feedback instrument, and creation of employee training and development plans. Contact person: Kelly Cooper (former HR Director), kcooper@cityofkennedale.com, 817-985-2106.

City of Goodyear, Arizona

Designed and implemented a Management Development Program including candidate selection process, creation of job-related competencies, and the design and delivery of supervisory and management level training workshops. List of competency-based training workshops included: Building Effective Work Teams, Communication, Decision Making, Performance Management, Problem Solving and Transitioning to Leadership.

City of Irvine, California

The City of Irvine retained Patrick Ibarra of the Mejorando Group to design a comprehensive and systematic succession planning process. Identified at risk positions within the city workforce, provided recommendations to improve recruitment, selection, training, development, and performance management practices, and created a succession planning process to include selection of candidates, administration of 360-degree feedback instrument, and creation of individual employee training and development plans. Contact Person: Jan Walden, Manager of Human Resources, 949-724-6277, jwalden@ci.irvine.ca.us

B. UNDERSTANDING AND APPROACH TO THE PROJECT

"When evaluating proposals for delivering training, the Meiorando Group's was right on target. From the start, Patrick demonstrated that he asks the right questions and listens to people's needs....And then he delivered. His workshops were wildly successful. Patrick gave our supervisors- and managers-to-be important tools they're using now to gain fast credibility with and support from the new teams they're leading. Patrick covered a wide range of topics, and kept the session lively and engaging. All attendees found the workshops to be extremely valuable, and it's great to know that we have Patrick as a skilled and responsive resource for our future training needs."

Aileen Evans
Port of Oakland, California

The current economic and social environment is pushing governments to make transformational change. Governments are at a crossroads. To meet rising expectations with shrinking resources, they need to make a choice: cut services, increase the tax burden or pursue a more value-oriented agenda that will put them on the path to higher performance. Leading governments like San Luis Obispo County are selecting the third option – finding innovative ways to create greater public-sector value from their resource by delivering improved outcomes more cost efficiently.

San Luis Obispo County wants to develop a corps of seasoned managers and leaders who can provide strategic leadership and commitment to policy administration and program effectiveness which fortifies the County's role as a community builder. In that pursuit, the Learning and Development Program is intended to:

- Develop an understanding of and competency in the various roles of a leader in a complex political environment.
- Increase the personal and interpersonal effectiveness of San Luis Obispo County leaders.
- Enhance the capacity of organizational leaders to think strategically and act as catalysts for and leaders of organizational change.
- Foster a culture of collaboration and innovation in a diverse workforce.
- Develop an environment of on-going learning and strategic, creative and innovative problem solving.

San Luis Obispo County adopted an Employee University approach to employee development and is at various stages of implementation. Currently, the Employee Development initiative includes three components:

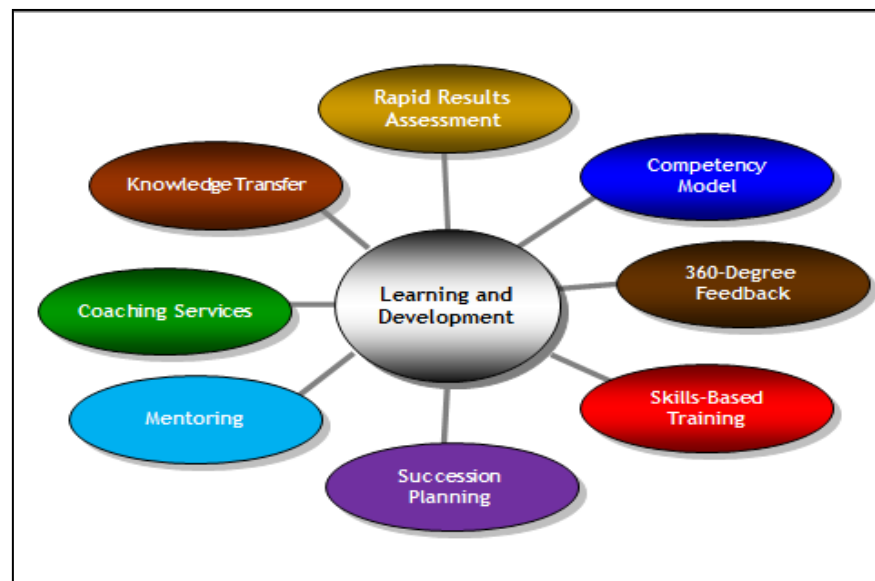
- Foundational Programs
- Developmental Programs
- Executive Development Programs

In an attempt to improve the execution of County services and programs by building the internal capabilities of its workforce, they have requested the assistance of qualified consultants to design and implement a County-wide Learning and Development Program with a special emphasis on a leadership academy (supervisory and managerial levels) as well as an executive level training program for County leadership (department directors).

SUMMARY OF APPROACH

The Mejorando Group is a team of consultants with in-depth expertise and proven experience collaborating with government leaders throughout the nation in creating and implementing leading-edge Learning/Training and Development Programs that have resulted in those organizations transitioning from the workforce they have to the workforce they need to remain a credible community builder.

The following diagram shows the dimensions involved in creating and implementing an effective Learning/Training and Development Program.



Based on the RFP, the initial emphasis is on Skills-Based Training and Knowledge Transfer. We will ensure each of the factors is fundamentally sound to equip workforce members with the skills, knowledge and capabilities essential to improving employee performance and organizational effectiveness. Using our expertise and experience, we

will partner with San Luis Obispo County leaders to synchronize the components thereby ensuring a successful Learning/Training and Development Program.

SCOPE OF WORK

In this Scope of Work, we share our experience and expertise in a demonstration of why the Mejorando Group is the firm most qualified to design and help implement the San Luis Obispo County Learning/Training and Development Program. Our recommendations will be designed to enable the organization to adopt and implement a comprehensive and systematic approach to building a more capable workforce.

We recommend the following approach to create a powerful and practical Program:

1. Leverage the results from the recently completed **Rapid Results Performance Needs Assessment** performed by our consulting team which identified a variety of factors influencing the County's current approach to learning and development, including succession planning and the role of the EUAC. This assessment was intended, by design, to be an abbreviated examination of various items and while serving as a helpful baseline, additional information is necessary to gain a higher-level of precision about the particular skill areas the resulting Learning and Development Program must effectively address.

Analyzing training needs provides a focus and direction for the investment the County will make in its workforce. Even when training needs appear to be obvious, it is still necessary to analyze the specific knowledge and skill requirements in order to choose appropriate methods that will meet them.

The benefits accrued from completing the Needs Assessment phase to San Luis Obispo County will be:

- Investment in training and development will have a focus and direction.
- Priority training needs throughout the County will become apparent.
- Appropriate methods for meeting these needs will be identified.
- Training will be systematic and planned but flexible enough to respond to ad hoc requests.
- The contribution training/learning makes to organizational effectiveness will be recognized.

The specific steps involved in completing a comprehensive Needs Assessment include:

- A. Facilitate meeting of members from the Executive Leadership Team (i.e. Elected Officials or their designee, County Administrator and Department Directors) and Human Resources Department staff responsible for organizational development and employee training to discuss the Learning and Development Program (L&D Program). The ELT has a crucial role in the adoption and subsequent implementation of a County-wide L&D Program. First is to generate the advocacy and support necessary for the successful implementation of the L&D Program. With competing priorities, it is always a challenge to provide the opportunities during the workday for employees to actively participate in organization-sponsored programs. Members of the ELT have the necessary “horsepower” to ensure employee participation is emphasized and realized. Second is to obtain substantive input toward the actual design components of the Program. In other words, to identify the skill and performance areas they perceive as needing improvement by members of their workforce.
 - B. Facilitate focus groups of a cross-section of employees from various County Departments to obtain their input/feedback about potential performance needs for the organization’s workforce.
 - C. Meet and consult with members of the Human Resource Department and Employee University Advisory Committee to obtain substantive input for program development.
 - D. Review a variety of materials to gain insight into San Luis Obispo County and its past experience with learning and development:
 - ✓ Feedback and Results of past learning and development initiatives targeted at equipping workforce members with the right mix of skills and capabilities.
 - ✓ County Department service level/performance reports
 - ✓ Workforce demographics
 - ✓ Technology available for delivery of training.
 - ✓ Others To Be Determined
2. Utilize the Workforce Analysis Report our team is currently completing to **identify critical positions**. These positions (i.e. county jobs/occupations) will serve as the basis for initial selection of program participants in the leadership academy and the focus of knowledge transfer strategies and techniques.
 3. Aggregate input/feedback from the information gathering steps – 1 and 2 - into a composite profile offering an analysis of current and past practices along with a recommended **Learning and Development Program**. This Program will serve as the Blueprint and will include:

- a) Course initiatives for a sustainable and contemporary leadership academy (supervisory and managerial levels), as well as an executive level training program for County leadership (department head and director levels). The academy will include multiple courses and incorporate adult learning best practices.
- b) Developing and provide course curriculum tailored to meet the specific needs of the County's mission, vision and values.
- c) The Mejorando Group team members serving as training instructor and providing alternate instructors as needed.
- d) Developing course evaluation tools; produce performance metrics based on course and program evaluations.
- e) Identification, assessment and recommendations regarding Employee University deficiencies/opportunities.
- f) Solutions provided for an effective, efficient, and sustainable knowledge transfer program to assist with succession planning efforts. We provide leading edge practices enabling organizations to effectively transfer high value tacit knowledge essential for performance continuity. Knowledge Transfer is a rapidly growing occurrence within forward-thinking organizations concerned about mitigating the impacts of the departure of seasoned employees.

Based on our past experience in similar situations with other local governments and our expertise in designing Learning and Development Programs, the San Luis Obispo County L&D Program, in addition to components stipulated in the RFP to be provided, *may eventually* include the following which would be scoped separately at the direction and discretion of the County:

- a) Design and administering of a County-wide Succession Planning Program.
- b) A process to establish competencies for non-supervisors, supervisors, managers and executives.
- c) Administering of 360-degree Assessment process for development purposes, only.
- d) Creation of customized Individual Development and Training Plan (i.e. self-development plan) for each participant in the Program.
- e) Design and implement a Mentoring Program.
- f) Provision of coaching services to accelerate individual employee performance.

The following is provided to demonstrate our team's in-depth expertise in the field of training.

Our "instructor-led, participant centered" approach to training limits lecture and focuses on using a variety of instructional methods (e.g. discussions, video-clips, case studies, small group exercises, handouts to complete, skill-practices, and group discussions) to maximize the use of Adult Learning. Our goal is for participants to master the knowledge, skills and behaviors emphasized in the training program and to apply them to their day-to-day activities. We build in methods to transfer the training and new behaviors out into the workplace, through the use of action planning, and examples and exercises from participants' work/life. We firmly believe the combination of factors including training content, purpose of the particular training, the methods used, the material itself, the delivery mechanism, the facilitator, the participants, the environment and the evaluation, must be aligned and comprehensive for the training to be effective.

The keys to our training being so effective are that we design it so as to:

- Maximize the similarity between the training situation and the job situation;
- Devote as much time and opportunity for skills practice as possible;
- Provide for a variety of examples when teaching concepts or skills;
- Make sure that general principles are understood before expecting too much transfer;
- Provide participants with the knowledge, skills and feelings of self-efficacy to self-regulate their own behavior/performance back on their jobs; and
- Design the training content so that the participants can see its applicability

Our firm has a portfolio of over forty competency-based training courses "ready to go" and which have been implemented on a recurring basis with other public sector agencies. We intend to actively leverage the existing training courses but will ensure the appropriate amount of customization necessary for the success of the Program. The custom design will make it much easier for the participants to accept, learn, and implement "back on the job." ***As a result of our extensive experience in local government, we provide examples that we will build into the training design, jargon we will use, strategies to ensure that the training "sticks," and actual situations that we will develop into role plays, case studies, and other hands-on activities.***

We seek to create and maintain interest in the topic, by encouraging question asking and by using a variety of instructional methods:

- Pre-workshop reading
- Skills Practice/Role Play

- Case studies
- In-session written assignments
- Teachable point of view (tell me a story)
- Self-Assessments
- Small group discussions
- Partner exercises
- Video
- Power Point
- Mini-lecture
- Presentations

Our delivery methods maximize the use of effective learning principles and balance the needs created by a variety of participants learning styles. The goal is for participants to master the knowledge, skills and behaviors emphasized in the training program and to apply them to their day-to-day activities. We build in methods to transfer the training and new behaviors out into the workplace, through the use of action planning, and examples and exercises from participants' work/life.

RESPONSES TO QUESTIONS ON PAGE 9 OF THE RFP

1. Explain your experience in the design and implementation of leadership training programs based on the specific needs of your client organizations. Please provide a detailed description of the program implementation process and timeline from start to finish, including the role you played in training other trainers or conducting the training yourself.

RESPONSE:

Our team has been actively involved in a number of leadership training programs for a variety of local government organizations.

- City of San Bruno (CA) – created a Leadership Academy Program including partnering with HR on a selection process, preparing curriculum for different levels of participants – supervisors, managers and executives, delivering training/curriculum, and analyzing course evaluations completed by participants for course modifications. Program duration was over several months. Academy program consisted of a cohort group of 10-12 employees per session that attended up to eight training workshops and included an action learning segment.
- City of Beverly Hills (CA) – partnered with Human Resources in creating a tiered learning program that consisted of separate curriculum for supervisors, managers and executives. Our team designed and delivered a number of training workshops over the course of several

months for those groups including the “Leadership Challenge” program for members of the Executive Leadership Team.

- City of Bismarck (ND) – a segment of the Workforce Planning Program we prepared included a pilot Leadership Academy. Our team established a participant selection process, administered a 360-degree self-assessment process for participants, translated the 360-degree report with each participant in creating a customized individual learning and development plan, reviewed the aggregated report for all program participants and recommended a tiered (i.e. supervisor, manager and executive) learning/training program.
- City of Chandler (AZ) – our team is currently finalizing the Workplace Competencies for members of the workforce and a segment will include a recommended learning/training program to help workforce members acquire the soon-to-be adopted competencies.
- We have designed and delivered a number of learning/training workshops for several cities including Arlington (TX), Austin (TX), Carlsbad (CA), Colleyville (TX), Concord (CA), Dublin (CA), Eloy (AZ), Glendale (AZ), Lenexa (KS), Midland (TX), Plano (TX), Redmond (WA), Thousand Oaks (CA), and Wellington (FL) and counties of Humboldt (CA), Mesa (CO) and Santa Barbara (CA).

In every program, except Bismarck, our team both designed and delivered the training workshops. We have not trained others within our client organizations as there has been no request but our team is well versed in the development and delivery of train-the-trainer programs.

2. Tell us how you would work with the County of San Luis Obispo’s Employee University to ensure a timely implementation and long term sustainability in the implementation of leadership and supervisory training initiatives? Please clearly identify the necessary components of a sustainable training program for timely roll-out and long term success.

RESPONSE:

Based on our experience with other local government agencies in similar situations and on our understanding about San Luis Obispo County, there are three major ingredients essential to the success of this project, both in the short- and long-term. These are:

- **San Luis Obispo County Acumen:** As a result of the recent project work with the County, we have established rapport with many key members of the County’s leadership team including the County Manager, HR Director

and the EUAC and gained a solid understanding about the County's workplace culture. These two factors are critical to ensuring a successful project. In addition to our expertise in designing and implementing learning and development programs, we understand very well the dynamics particular to County governments in California, especially about effective ways to navigate the nuances and subtleties related to civil service and departments lead by elected officials.

- **Effective Project Management:** At the inception of the project, our team will partner with the County's HR team in finalizing the project schedule and clarifying our respective roles. Throughout the project, we will maintain close contact with the County liaison providing status updates, making any necessary adjustments and managing expectations.
- **Experience and Expertise:** Our team has in-depth experience and extensive expertise in the successful implementation of a number of learning and development programs and succession planning processes for local governments. We blend that with our fluency in change management to assist leaders in replacing the status quo with a new way of equipping members of their workforce with the skills and capabilities necessary for high-quality public service. We understand extremely well the most productive means by which to establish new organizational anchors for change to succeed and are very proud of our track record of sustainable change with clients in their journey to "get better all the time."

In addition, to three areas described above the other necessary components are:

- Visible advocacy and support by organizational leaders
- Effective leadership demonstrated by Human Resources Department
- Sufficient budgetary resources
- Experienced consultants such as the Mejorando Group with proven expertise
- Timely communication throughout the project
- Well-designed learning opportunities for all segments of the agency's workforce
- Training curriculum that utilizes adult-learning principles
- Satisfactory linkage between learning programs and the skills necessary for success "on the job"
- Multiple learning platforms – classroom, online, and mobile
- Useful training evaluation that allows for necessary modifications to training content and delivery

3. Tell us about your experience in developing and implementing effective succession planning solutions in a Civil Service environment. Please also discuss your past experience in providing creative, innovative and practical knowledge transfer solutions for an organization similarly structured to the County (variety of departments of different sizes and needs).

RESPONSE:

The cities of Irvine and San Jose (CA) both utilize civil service. While civil service presents some rather unique challenges, our team was able to identify a number of areas where progressive succession planning solutions were executed. In particular, establishing and implementing learning and development initiatives including utilizing a completed workforce analysis report to establish the initial focus of succession planning along with a Leadership Academy.

The Mejorando Group has been actively involved in the design and implementation of forward-looking knowledge transfer programs for three different public sector organizations:

- City of Fort Collins (CO) - designed and implemented a Knowledge Management Transfer Program for members of senior management within the Public Utilities Department. This included conducting Expert Interviews, creating Position Profiles, and providing a series of specific transfer tools and techniques.
 - City of Bismarck (ND) – Provided a Knowledge Management Transfer Program involving a series of specific strategies including: 1) Apprenticeships, Internships and Traineeships; 2) Communities of Practice; 3) Document Repositories; 4) Job Aids; 5) On-the-Job Training; 6) Expert Interviews; and 7) Retire to Rehire.
 - Costa Mesa Sanitary District (CA) - designed and implemented a Knowledge Management Transfer Program for all members of the organization – field personnel, administrative support, managerial and executive. This included conducting Expert Interviews, creating Position Profiles, and providing a series of specific transfer tools and techniques.
4. Provide a statement that the Proposer has at least (5) years of experience providing services on employee training and development as requested in this RFP and a list of customers for whom said services were performed. For each customer, provide:

RESPONSE:

The Mejorando Group was established in 2002. Consequently, our team has over 11 years of experience providing services on employee training and development as requested in the RFP.

List of customers including the Name of entity, Services performed and Date services were performed:

City of San Bruno, California: Developed and implemented a Leadership Development Program that included establishing the candidate /participant selection process, the design and delivery of competency based training workshops and facilitation of action learning project teams. List of competency-based training workshops included: Art of Delegation, Creative Problem Solving, Facilitating Change, How to Inject Innovation into Local Government, Motivating Employees, Performance Management, Project Management, Taking Initiative: How to be more of a Leader, and Transitioning to Supervision. An on-line component was also included in this Leadership Development Academy that involved participants accessing content via the Mejorando Group's website and engaging in several threaded discussions about workshop related topics. 2007-2009

City of Bismarck, North Dakota: Designed and implemented the City's inaugural succession planning program that included a Learning and Development Program. The Leadership Development component encompassed facilitating work groups to adopt job-related competencies, creating program participant selection process, administering 360-degree process, facilitating one-on-one debriefs with participants to craft customized individual development and training plan and selecting training workshops. 2008-09

City of Fort Collins, Colorado: Patrick Ibarra of the Mejorando Group was retained to design and implement a Knowledge Management Transfer Program for members of senior management within the Public Utilities Department. This included conducting Expert Interviews, creating Position Profiles, and providing a series of specific transfer tools and techniques. 2010-11

Town of Gilbert, Arizona: The Town of Gilbert obtained consulting services from the Mejorando Group to assist with implementation of a Talent Management approach to building workforce capacity. Services included evaluating workforce demographics to identify future staffing needs, creating performance leadership competencies through the facilitation of employee work groups, and providing a series of cohesive recommendations that make immediate improvements to recruitment, selection and promotional practices. 2012-present

City of Chandler, Arizona: The City of Chandler retained the Mejorando Group to provide succession planning consulting services as an approach to building workforce capacity. Services include evaluating workforce demographics to identify future staffing needs, creating performance leadership competencies through the facilitation of employee work groups, and designing and facilitating the creation of a Pilot Leadership Development Program that will include a 360-degree feedback assessment component along with curriculum development. 2013-present

City of Colleyville, Texas: The City of Colleyville retained Patrick Ibarra of the Mejorando Group to design a comprehensive and systematic succession planning program. This program was the recipient of the Texas Municipal League Municipal Excellence Award. It identified at risk positions within the city workforce, featured recommendations to improve recruitment, selection, training, development, and performance management practices, and created a succession planning process to include selection of candidates, administration of 360-degree feedback instrument, and creation of employee training and development plans. 2005-06

City of Goodyear, Arizona: Designed and implemented a Management Development Program including candidate selection process, creation of job-related competencies, and the design and delivery of supervisory and management level training workshops. List of competency-based training workshops included: Building Effective Work Teams, Communication, Decision Making, Performance Management, Problem Solving and Transitioning to Leadership. 2007

City of Irvine, California: The City of Irvine retained Patrick Ibarra of the Mejorando Group to design a comprehensive and systematic succession planning process. Identified at risk positions within the city workforce, provided recommendations to improve recruitment, selection, training, development, and performance management practices, and created a succession planning process to include selection of candidates, administration of 360-degree feedback instrument, and creation of individual employee training and development plans. 2007-08

PARTICIPATION BY COUNTY STAFF

The project start-up activity will form the foundation for the partnership between Mejorando Group and the County. This initial planning meeting will afford the opportunity to share information, establish communication protocols and refine the project schedule and work plan so that it is comfortably integrated with County staff's other work demands. The level of participation by county staff will be as follows:

- Human Resources staff members for finalizing the scope at the inception of the project and periodically throughout the project for consultation.
- Employee University Advisory Committee members for one meeting and select members periodically throughout the project for consultation.
- Members of the Executive Leadership Team for one meeting.
- Various county employees for participation in focus groups.

PROJECT SCHEDULE AND FEE

We have prepared a project schedule accompanied by our fees for the County based on the needs and objectives as outlined in the RFP, as well as our experience in conducting similar engagements for clients in local government.

Schedule and Fee			
Work Steps	Services	Time	Fee
1. Program Development	<ul style="list-style-type: none"> ▪ Meet with County Human Resource Team to: <ul style="list-style-type: none"> ○ Finalize Project Scope and Schedule ○ Obtain role clarity ▪ Facilitate meeting of members from the Executive Leadership Team (i.e. Elected Officials or their designee, County Administrator and Department Directors) and HR Department staff responsible for organizational development and employee training to discuss the Learning and Development Program. ▪ Facilitate twelve focus group meetings of a cross-section of employees from various County Departments to obtain their input/feedback about potential performance needs for the organization's workforce. ▪ Review a variety of materials to gain insight into San Luis Obispo County and its past experience with learning and development. ▪ Confer with Human Resource staff members and the Employee University Advisory Committee. ▪ Provide an effective Knowledge Transfer Program. 	Dec/Jan	\$22,000

Schedule and Fee			
Work Steps	Services	Time	Fee
2. Prepare Plan	<ul style="list-style-type: none"> Aggregate and analyze information gathered in preparation of Plan for Learning and Development. Identify course curriculum. Develop and provide course curriculum. Develop course evaluation tools, produce performance metrics based on course and program evaluations. 	Jan/ Feb	\$13,000
3. Program- Training Implementation	<ul style="list-style-type: none"> Deliver training workshops. 	TBD	\$2,500 ½ day workshop and \$3,800 full day workshop
TOTAL	Total Fee (excluding training delivery which is based on number of training workshops actually presented)		\$35,000
Provide Consulting Services	<ul style="list-style-type: none"> Provide as-needed consulting services to assist with implementation of Learning and Development Program components. 	TBD	\$225 hourly

Reimbursement for reasonable and customary travel expenses is estimated at \$2,500 for the preparation of Program Development.

Travel expenses for delivery of training are dependent upon extent of on-site training delivery provided.

CONSULTING SERVICES

The Mejorando Group is well-versed and highly experienced in all aspects of Learning and Development Programs and Succession Planning processes, from inception to implementation. As part of our commitment to helping San Luis Obispo County in their quest to “get better all the time,” we are available to provide consultation/advisory services to ensure the success of the Program is realized.